

PROCUREMENT TEMPLATE · 2026

DSO AI Vendor Due Diligence Template

A procurement-grade evaluation framework for DSOs choosing an AI front-office vendor at scale. 8 categories, 60+ questions.

— How to use this template

This template is for DSO procurement, vendor risk, and clinical operations leaders evaluating AI front-office vendors at scale. Use it as the basis of your RFP, your security questionnaire, and your reference-check framework.

8 evaluation categories:

- 1. Product fit and depth
- 2. PMS integration coverage
- 3. Compliance, security, and BAA
- 4. Multi-location governance and controls
- 5. Reporting and analytics
- 6. Implementation and change management
- 7. Pricing, contracting, and procurement
- 8. Vendor stability and references

Approximately 60 questions across the 8 categories. Use the score sheet at the end to weight and aggregate.

— 1. Product fit and depth

- What dental-specific behaviors ship out of the box vs. require configuration?
- How does the AI handle paired appointments (orto + cleaning, perio + recall)?
- How does the AI handle dependent insurance verification (parent calling for child)?
- How does the AI handle pediatric vs. adult voice nuances?
- What's the depth of channel parity between voice, chat, SMS, and admin?
- Is the AI designed for primary front-line role or overflow?
- How does the AI handle pain-empathy-first conversation flow?
- What languages does the AI support? Day-one vs. roadmap?

— 2. PMS integration coverage

- Which PMSes have production two-way integration?
- Which PMSes have read-only integration?
- What specifically reads and writes? Can we see a live demo with our actual PMS?
- How does the integration handle PMS downtime or partial outage?
- Roadmap with quarter targets for any preview-status PMSes?
- How are appointment conflicts and double-bookings prevented?
- What's the data sync latency between AI and PMS?
- Can we audit every write the AI made to the PMS?

— 3. Compliance, security, BAA

- Same-day BAA available?
- SOC 2 Type II status — current report or in-progress with target?
- HIPAA technical, administrative, and physical safeguard documentation?
- Data residency — U.S.-based for U.S. customers?
- Encryption in transit and at rest — what algorithms, what key management?
- How is PHI access logged and audited?
- Vendor security questionnaire turnaround SLA?
- Subprocessor list and BAAs with each subprocessor?
- Incident response plan and notification SLA?

— 4. Multi-location governance and controls

- Group-level vs. per-location configuration boundaries?
- Which settings can a location override and which are enforced at group?
- Single sign-on (SSO) — SAML and which providers?
- SCIM provisioning supported?
- Role-based access control granularity?
- Audit log export to SIEM — supported, what format?
- Voice persona configuration — group default with per-location override?
- How is a new location onboarded? Cloning a configuration vs. starting fresh?

— 5. Reporting and analytics

- Group-level dashboard — call volume, conversion, revenue captured per location and rolled up?
- Per-location dashboard with same metrics?
- Custom reporting — can we build our own queries or get raw data export?
- API access to call logs, appointments, leads, transcripts?
- Real-time vs. batched reporting?
- Comparison reports — location vs. location, period vs. period?
- Integration with our BI stack (Tableau, Looker, Power BI)?

— 6. Implementation and change management

- Standard launch timeline per location?
- Phased rollout supported (pilot → expand)?
- Dedicated implementation lead vs. shared?
- Training resources for office managers, regional leads?
- Change management support during go-live?
- Ongoing CS cadence post-launch?
- Office-hours or async support availability?

— 7. Pricing, contracting, and procurement

- Pricing model — per-location, per-call, per-minute, flat?
- Volume tier discounts at 10, 25, 50, 100 locations?
- Multi-year discount available?
- Phased-go-live pricing — pay as locations onboard?
- Standard MSA or willing to use ours?
- Termination clause and assistance period?
- Price escalation cap?
- Pilot pricing or 30-day rollback clause?

— 8. Vendor stability and references

- Years operating in the dental category?
- Funding and runway transparency?
- Customer references at our scale (10+ locations)?
- Customer churn rate?
- Public roadmap with quarter targets?
- Status page / incident history?
- How does the vendor handle being acquired or shut down? Data export and termination assistance?

— Vendor score sheet

Score each vendor on the 8 categories above using a 1-5 scale (1=poor, 5=excellent). Apply weight if some categories matter more for your specific group.

CATEGORY	SCORE (1-5)	WEIGHT	WEIGHTED
1. Product fit and depth	_____	_____	_____
2. PMS integration coverage	_____	_____	_____
3. Compliance, security, and BAA	_____	_____	_____
4. Multi-location governance	_____	_____	_____
5. Reporting and analytics	_____	_____	_____
6. Implementation and change management	_____	_____	_____
7. Pricing, contracting, procurement	_____	_____	_____
8. Vendor stability and references	_____	_____	_____
TOTAL WEIGHTED SCORE			_____

RUN THIS TEMPLATE AGAINST ARIA.

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We'll respond to all 60+ questions in writing within 5 business days. Email enterprise@ariadental.ai.